iTrack Administration Guide

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iTrack is a system for tracking significant issues arising from reviews, audits, assessments, lessons learned and other feedback related to Fermi National Accelerator Laboratory. The system allows the user community to assign the items to responsible parties for the formulation of a resolution through Corrective Action Plans (CAP) and Milestones.

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I. Introduction

iTrack is the part of the Laboratory's issue tracking system used for issues other than ES&H. (ES&H issues are currently handled through the "frESHTRK" application, which is an alternative interface to the same database.) This document is a guide for iTrack application administrators to manage user access permissions for entering and updating Review and Item information in iTrack.

Additionally, this document provides the administrator with instructions creating a new Review Category in iTrack or modifyng an existing Review Category.

Users of iTrack should see the "iTrack Users' Guide." The iTrack application is entered through https://www-esh.fnal.gov/pls/cert/iTrack.html.

II. Users

An iTrack user is granted privileges for one or more organizations by the administrator. The iTrack application administrator will grant privileges only upon written approval from the responsible management chain.

Create a User in iTrack

ES&H web applications are administered through https://www-esh.fnal.gov/pls/cert/app_privs.html. There are three (3) different privileges that can be administered from this site … Oracle Forms (Database) Applications, Web-based Applications and Contacts … The administration of iTrack user access is under the Contacts column. Look for iTrack in the column and select the entry. The entry may not appear alphabetically in the list since the name starts with a lower case "i".

You will be presented with the list of current iTrack users:

ES&H Web/Database Privileges

ES&H Web/Database Privileges

Home

Contacts iTrack Add New Contact

D/S	Fermi ID	Name	
CCD	10089N	Arena, Matthew	Remove
CD	16057N	True, Kevin L	Remove
DI	10089N	Arena, Matthew	Remove
DI	10122N	Crawford, Matt	Remove
DI	01384N	Erickson, Terry L	Remove
DI	11927N	Hoffer, Dean A	Remove
DI	11668N	Tolian, Mary E	Remove
DI	16057N	True, Kevin L	Remove
ES	08179C	Heyes, Jed	Remove
ES	09164C	Martzel, John F	Remove
FI	14919N	Klepper, Kevin M	Remove
FI	13026N	Meduga, Susan	Remove
FI	11027N	Rhoades, Michael F.	Remove

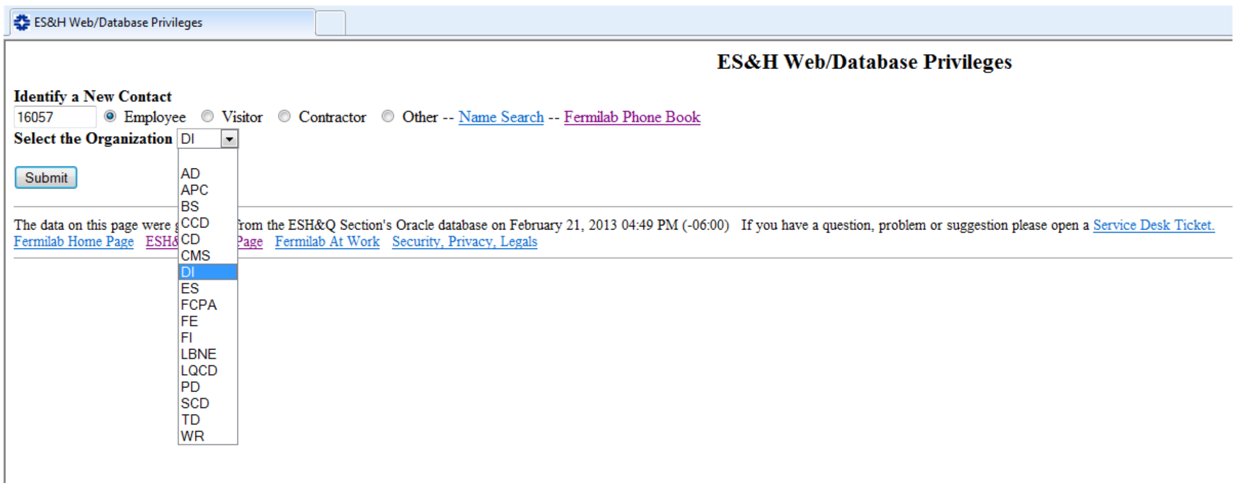
You will notice that users are assigned to a Division or Section. Multiple entries are required for users who are to have access to multiple Divisions or Sections.

Selecting “Add New Contact” will provide you with an entry screen for putting in the employee ID and associated D/S they are acting as a user for.

You may enter the users Fermilab ID if known or look up the name in the Fermilab directory using Name Search or Fermilab Phone Book.

After entering the users Fermilab ID, select the D/S organization the request is for from the drop-down menu.

Click on “Submit” and the user will be added to the list of users with the D/S selected from the drop-down menu.



Delete a User in iTrack …

If a user’s privileges should be removed from iTrack, select the “Remove” feature next to the name of the user in the table. The table is sorted by organization, then by Name. A user may be have multiple entries for multiple organizations, so ensure that the delete action is the correct Division or Section. If the user is no longer associated with Fermilab, verify that all their entries are removed from the contacts table.

III. Review Category

Within iTrack there is an element named Review Category as its default nomenclature. This field is presented as a selection field when creating or editing a Review. Review Category is an element to identify an organization or group that is using iTrack to enter, track and close out issues that have been identified. This section will address the steps that are required to create a new Review Category within iTrack and the associated tables that need to be built for the Review Category to be usable.

These build activities require iTrack administrator privileges. Creation, modification and deletion of these elements should be requested through Service Now with the spreadsheet provided below completed and attached to the request.

Field Name Nomenclature

All of the field labels within iTrack are set up as user defineable for a Review Category. All of the fields have a default value as indicated in the spreadsheet link provided below. If the Review Category does not use terminology consistent with the default nomenclature, it should modify the "Override Nomenclature" column with the preferred nomenclature for that field name. The iTrack field entry and reporting screens will display the selected nomenclature after the administrator has entered the nomenclature for the Review Category. Only the fields that are not consistent with the default nomenclature have to be provided to the administrator for entry.

The file `iTrack Default Nomenclatures.xlsx` for adding a new or modification to an existing Review Category can be found on SharePoint at the following address

https://sharepoint.fnal.gov/project/itrack/Shared%20Documents/iTrack%20Default%20Nomenclatures.xlsx

Item Type

Item Type is a required field within iTrack. This field is associated with the Item level information. It is an indication of the type of issue that is being entered and tracked within iTrack. There is a tab within the file noted above to update the Item Type values that the organization or group wants to use within iTrack. All item types are available to all Review Categories.

Item Sub Type

Item Sub Type is a required field within iTrack. At least one entry is required for every Review Category. N/A is currently noted in the file for the administrator. This field can be used to define the Item Types at a lower level of detail.

Administrator Activities

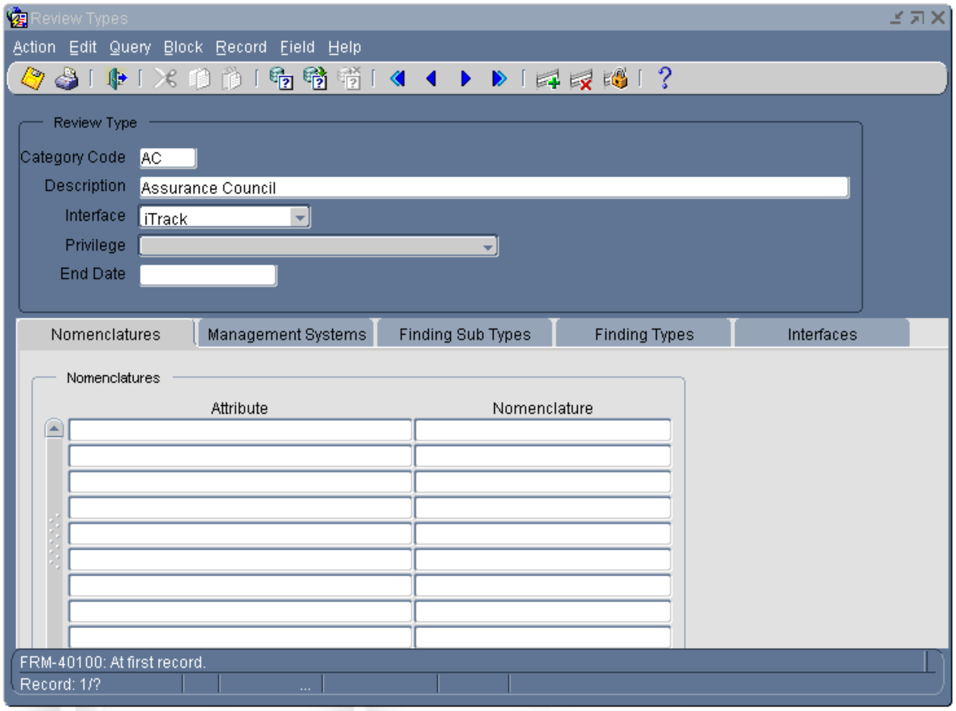
The iTrack administrator will process the user request and supplied spreadsheet. The following will explain the required activities to process the user supplied spreadsheet entries.

Access to the iTrack configuration settings is through

- Fermilab ES&H Section / Computer Support / Oracle Data Entry
  - http://www-esh.fnal.gov/pls/default/web_forms.html
- Select frESHTRK from this presented page
  - http://www-esh.fnal.gov/pls/default/Web_Forms.apps?name=ESHTRK
- Select Review Types from this presented page
  - http://www-esh.fnal.gov/forms/frmservlet?form=C:/Web_Forms/ESHTRK/REVIEW_TYPES.fmx&width=1050&height=675&otherparams=useSDI=yes&lookAndFeel=oracle&colorScheme=blue

This will initiate a Java process log in to the platform. Enter the appropriate username and password for the platform that the updates are being applied to, development, integration, or production. First time users of the adminstrator's data entry screen may need to install the Java VM. This process will occur automatically but requires local administrator privilege. Please open a service desk ticket if you cannot install the Java VM.

The administrator will be presented with the Oracle form for Review Types as shown below.



This form is for entry of both iTrack and frESHTRK configuration items. The administrator should execute a new query to ensure they are only working with the iTrack information.

- Select the Enter Query icon or the Enter option from the Query menu
- Select the Interface drop-down arrow
- Select iTrack
- Select the Execute Query icon or the Execute option from the Query menu

This will provide the administrator with all of the records and associated blocks for the iTrack configurations.

- Records in this form are associated to the Category Code
- Blocks are the underlying information for iTrack
  - Management Systems and Interfaces should NOT be modified information when adding or updating a Category Code
  - Nomenclatures – The administrator will enter all of the override information provided by the requester in the spreadsheet's Field Name Nomenclature tab.
    - Only the fields with override information need to be entered noting the Attribute and the requested Nomenclature.
    - No entries are required in this Block for the Category Code
  - Finding Types – The administrator will enter all of the information provided in the spreadsheet Item Type tab by the requester.
    - At least one entry is required in this Block
  - Finding Sub Types – The administrator will enter all of the information provided in the spreadsheet Item Sub Type tab by the requester.
    - At least one entry is required in this Block
    - Note – Finding Sub Types are unique for each Review Category

Adding a new Review Category

To enter a new user requested Review Category.

- Select the Category Code field

- Select the Insert Record icon or the Record / Insert menu option
- Enter the following information
    - Category Code – A unique identifier for the new Review Category. This will not be supplied by the requester and can be filled in by the administrator.
    - Description – The Review Category name provided by the requester in the nomenclature tab of the spreadsheet.

Entering Override Nomenclature

To enter any requested override nomenclature for the Review Category.

- Select the first record in the Nomenclature block
- Enter the Attribute and Nomenclature provided by the requester
- Continue with next line until all override information is entered

Entering Finding Types

Enter the user requested Finding Types. At least one entry is required for this block.

- Select the Finding Types block
- Enter the Type
    - This field should be consistent across all Review Categories if common Description used.
- Enter the Description
- Continue with the next line until all Finding Type information is entered

Entering Finding Sub Types

To enter the Finding Sub Types. At least one entry is required for this block.

- Select the Finding Sub Types block
- Enter a Code
    - This is chosen by the administrator
- Enter the Description
- Parent Code – This field is not used in iTrack
- End Date – This field is not required
    - Prevents the sub type from being used on future items.

Saving new / modified Information

When the user requested information has been entered completely, the administrator should now save the entered information by selecting the Save icon or the Action / Save menu option.

Updating existing Review Category information

Locate the record within the Review Category that the user requests for modification. Update the appropriate field and save the changes per the *Saving new / modified Information* section in this document.

Delete existing Review Category information

Locate the record(s) that the user has requested to be removed from the Review Category configuration. Select the record and then select the Remove Record icon or the Record / Remove menu option. Save the changes per the *Saving new / modified Information* section in this document.

Revision History			
0.1	2013-03-06	K. True	New Document
0.2	2013-03-08	K. True	Applied feedback from M. Arena
0.3	2013-03-11	M. Crawford	Formatted more similarly to Users' Guide